

SUMMARY OF INFORMATION (SOI)

DOA's Certification Letter

Proposed Provider		Amount	\$
Contract Dates		BA 22 Attached (✓) <input type="checkbox"/>	
✓	Certification Requirements <i>(Check applicable items)</i>		
<input type="checkbox"/>	<p>1. Either no employee of this agency is both competent and available to perform the services called for by the proposed contract and/or the services called for are not the type readily susceptible of being performed by persons who are employed by the State on a continuing basis.</p> <p>A. We certify that there is no relationship or association between this Contractor and employees of this Agency which would be prohibited by the Code of Ethics (such as family relationships or business association), or which would give the appearance of affecting the judgment of employees in negotiating, monitoring or paying for this contracted service.</p> <p>B. If the contract is with a state employee (either Civil Service or unclassified), ethics clearance has been received in order to ensure that there is no violation of the provisions of R.S. 39:1498 (A)(4).</p>		
<input type="checkbox"/>	2. The services are not available as a product of a prior or existing professional, personal consulting, or social services contract.		
<input type="checkbox"/>	3. When applicable, the requirements for consultant contracts, as provided for under R.S. 39:1503-1507, have been complied with (proper documentation should be provided).		
<input type="checkbox"/>	<p>4. The using agency has developed and fully intends to implement a written plan providing for:</p> <p>The assignment of specific Agency personnel to a monitoring and liaison function. Identify name of individual or staff unit responsible for monitoring this contract:</p> <p style="margin-left: 40px;">Name: _____ Phone No.: _____</p> <p style="margin-left: 40px;">Location: _____</p> <p>Summary of Monitoring Plan: This must include periodic review of specified reports, documents, exception reporting, or other indicia of performance, etc. (Additional pages may be attached if necessary.)</p> <p>The ultimate use of the final product of the services: (Specify)</p>		
<input type="checkbox"/>	<p>5. Respond to questions A or B on all contracts except those funded by Other Charges (34XX series) of Budget:</p> <p>A. What critical services will go unprovided and to whom:</p> <p>B. How many hours will the contractor have to work?</p>		
<input type="checkbox"/>	6. A cost-benefit analysis has been conducted, which indicates that obtaining these services from the private sector is more cost-effective than providing these services by the Agency or by a non-financial agreement with another state agency, to include both a short-term and long-term analysis.		
<input type="checkbox"/>	7. The cost basis for this contract was determined to be justified and reasonable based on: <p style="margin-left: 40px;">Cost basis is:</p>		
<input type="checkbox"/>	8. The specific goals and objectives of this contract are: (Note: the goals and objectives must be clear, measurable and time bound.)		
<input type="checkbox"/>	9. The methods to be used to measure and determine contract performance are:		
<input type="checkbox"/>	10. A completed monitoring report will be submitted to the Office of Contractual Review within 60 days after termination of contract.		
<input type="checkbox"/>	11. For Personal, Professional, Consulting and Social Services contracts not exceeding \$20,000: The services have not been artificially divided so as to constitute a small purchase (not exceeding \$20,000).		

Yes	No	Certification of Minimum Contract Content
<input type="checkbox"/>	<input type="checkbox"/>	1. Contains a date upon which the contract is to begin and upon which the contract will terminate.
<input type="checkbox"/>	<input type="checkbox"/>	2. Contains a description of the work to be performed and objectives to be met.
<input type="checkbox"/>	<input type="checkbox"/>	3. Contains an amount and time payments to be made.
<input type="checkbox"/>	<input type="checkbox"/>	4. Contains a description of reports or other deliverables to be received, when applicable.
<input type="checkbox"/>	<input type="checkbox"/>	5. Contains a date of reports or other deliverables to be received, when applicable.
<input type="checkbox"/>	<input type="checkbox"/>	6. When a contract includes travel and/or other reimbursable expenses, it contains language to effect the following: A. Travel and other reimbursable expenses shall constitute part of the total maximum payable under the contract; OR B. No more than (a certain sum) of the total maximum amount payable under this contract shall be paid or received as reimbursement for travel and other reimbursable expenses; AND C. Travel expenses shall be reimbursed in accordance with Division of Administration Policy and Procedure Memorandum 49 (The State General Travel Regulations).
<input type="checkbox"/>	<input type="checkbox"/>	7. Contains the responsibility for payment of taxes.
<input type="checkbox"/>	<input type="checkbox"/>	8. Contains the circumstances under which the contract can be terminated either with or without cause and contains the remedies for default.
<input type="checkbox"/>	<input type="checkbox"/>	9. Contains a statement giving the Legislative Auditor the authority to audit records of the individual(s) or firm(s).
<input type="checkbox"/>	<input type="checkbox"/>	10. Contains an assignability clause as provided for under LAC-4:.4.
<input type="checkbox"/>	<input type="checkbox"/>	11. Budget Form BA-22, fully completed and attached to back of each contract.

Yes	No	Determination of Responsibility
<input type="checkbox"/>	<input type="checkbox"/>	1. Has adequate financial resources for performance, or has the ability to obtain such resources as required during performance.
<input type="checkbox"/>	<input type="checkbox"/>	2. Has the necessary experience, organization, technical qualifications, skills and facilities or has the ability to obtain them (including probable subcontractor arrangements).
<input type="checkbox"/>	<input type="checkbox"/>	3. Is able to comply with the proposed or required time of delivery or performance schedule.
<input type="checkbox"/>	<input type="checkbox"/>	4. Has a satisfactory record of integrity, judgment and performance (contractors which are seriously delinquent in current contract performance, considering the number of contracts and the extent of delinquencies of each, shall in the absence of evidence to the contrary or compelling circumstances presumed to be unable to fulfill this agreement).
<input type="checkbox"/>	<input type="checkbox"/>	5. Is otherwise qualified and eligible to receive an award under applicable laws and regulations.
<input type="checkbox"/>	<input type="checkbox"/>	6. A contract for consulting services is for \$50,000 or more. The head of the using agency has prepared, signed and placed in the contract file a statement of the facts on which a determination of responsibility of offeror or potential subcontractors have been filed with the statement.
<input type="checkbox"/>	<input type="checkbox"/>	7. On subcontracting, it has been established that contractor's recent performance history indicates acceptable subcontracting systems; or major subcontractors have been determined by the heads of the using agency to satisfy standard.

R.F.P. CONSULTING CONTRACTS FOR \$50,000 OR MORE OR SOCIAL SERVICES CONTRACTS FOR \$250,000 OR MORE; UNLESS DETERMINED EXEMPT AS PER ACT 673 OF 1985, R.S. 39:1494.1 (A).

Contract file attached and this includes (✓):	<input type="checkbox"/> Criteria for Selection	<input type="checkbox"/> Proposals	<input type="checkbox"/> Pertinent Documents	<input type="checkbox"/> Selection Memorandum
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Prepared By		Approved & Submitted By			
Name:		Undersecretary and/or Director and/or Assistant Secretary			
Title:		Signature(s) (Requires two if multiple administrators approve):			
Ph. #		Signature:			
Office:		Office		Office	

Prior Contract Information (Must be completed – If no prior contract, check N/A)					
Prior Year Services Provided By					
CFMS#		DOA#		Eff	
Term		Amount	\$	N/A: <input type="checkbox"/>	